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UNDERSTANDING THE MARKET FOR FACSIMILE EQUIPMENT

An Industry Benchmark Study
Conducted By
FORTUNE Magazine

Co-Sponsored By The
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Dealers Association (NOMDA)

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OBJECTIVES

This study was conducted to provide a comprehensive picture of the market for facsimile equipment. The research explored the following questions:

1. How knowledgeable is the target market about facsimile equipment?

2. What is the competition for facsimile; that is, how is information currently being sent from one place to another?

3. How likely is the target market to purchase facsimile equipment in the next year and how is the purchase decision made?

4. What new features of facsimile equipment seem most appealing to the target market?

5. How widespread is facsimile ownership and how is the equipment used?

METHOD

A questionnaire packet was mailed to a random sample of FORTUNE subscribers. FORTUNE subscribers are a reasonable surrogate for the facsimile target market because FORTUNE subscribers are employed in companies that are the candidates for facsimile equipment and occupy positions within the company that influence purchase decisions.

The questionnaire packet contained a cover letter with FORTUNE's logo that was signed by the publisher, an eight-page questionnaire, a stamped return envelope addressed to FORTUNE, and a one dollar incentive. FORTUNE was clearly identified as the sponsor of the research in these ways to increase the response rate. This identification would not influence answers, however, since no questions about FORTUNE were asked. A copy of all the mailing materials is contained in the Appendix to this report.

In spite of these steps the response rate was a little low (596 returned of the 2,000 mailed = 30%). A telephone interview among 100 non-respondents confirmed that the reason for the low response rate was respondents' unfamiliarity with facsimile (the questionnaire used in this telephone study is also contained in the Appendix). The relatively low response rate, therefore, does not affect the results of the survey since the analysis will focus on those respondents who are knowledgeable about facsimile equipment. The only data from the mailed survey that is affected is the estimate of how knowledgeable the subscriber group is about facsimile. An unbiased estimate of knowledgeability can be calculated using data from both the mailed and telephone studies and is presented in the next section.

The mailed questionnaire was in the field between May 12 and June 8, 1987. The telephone survey was conducted between June 5 and June 7, 1987. Beta Research Corporation, an independent research company located in Syosset, New York, handled all fieldwork and tabulations and conducted the telephone interviews.

RESULTS

A. How Knowledgeable Is The Target Market About Facsimile Equipment?

The front page of the questionnaire contained an open-ended question that was used to determine how knowledgeable the respondent was about facsimile. The question asked the respondent to describe what facsimile equipment does, that is, the principal use of facsimile equipment. The questionnaire booklet was sealed, and respondents were instructed to answer this question and another question before opening the booklet. The other question was also open-ended and asked about other names used to refer to facsimile equipment. Respondents were also instructed not to return to either of these questions once they had started the questions inside. This elaborate scheme was used because a full description of facsimile was provided inside the questionnaire and a measure of unaided knowledge was sought.

In the mailed version of the study, 61% correctly described the use of facsimile equipment, while in the telephone study of non-respondents, only 32% were correct. Combining these incidences with the response rate yields an estimate of how knowledgeable the entire subscriber group is: Among the 30% who responded, 61% were knowledgeable, or 18% of the subscriber group (30% X 61% = 18%); and among the 70% who did not respond, 32% were knowledgeable, or 22% of the subscriber group (70% X 32% = 22%).

- Altogether, then, only 40% of FORTUNE subscribers (18% + 22%) are knowledgeable about facsimile equipment on an unaided basis. This is a very low knowledgeability level and is probably one of the biggest marketing barriers for the industry -- the target market is not yet knowledgeable about the product.

- The most common misconception (99% of those that did not give a correct description) is that facsimile equipment is photocopying equipment, even though some (10%) know that the terms "fax" and "telecopiers" are used to refer to facsimile equipment. No clear differentiation in terminology has yet been established -- the market confuses "facsimile" with "photocopy."

The questionnaire was designed to test whether the lack of knowledge was the result of confusion in terminology or, more fundamentally, the result of no familiarity with the equipment. After

respondents opened the booklet, they were asked to read a detailed description of facsimile equipment and were then asked how familiar they had been with facsimile equipment before reading the description. If the lack of knowledge was simply the result of confusion in terminology, respondents would report familiarity with the equipment now that the confusion had been resolved. Instead, only 21% of those who had incorrectly described facsimile equipment report that they had been very or fairly familiar with facsimile equipment.

- The description provided did not serve to remind people about facsimile, but instead informed people about facsimile -- most respondents who did not describe facsimile correctly are not familiar with the equipment.

The remainder of the analysis will examine only those respondents who correctly described facsimile -- these are the only respondents for which there is evidence that they know about facsimile equipment and would therefore be answering the questions referring to the proper piece of equipment. In addition, the analysis excludes respondents who did not claim to be at least somewhat familiar with facsimile equipment.

B. What Is The Competition For Facsimile?

The questionnaire set up a hypothetical situation where the text of an important six-page document needed to be sent within the same city, within the same state, across the country, and international and asked respondents to indicate the percentage of time various services would be used.

Respondents who do not have facsimile equipment use the following services:

Within the same city:	regular mail	48%
	messenger services	27
Within the same state:	regular mail	54%
	private express mail services	24
Across the country:	regular mail	43%
	private express mail services	37
International:	regular mail	47%
	private express mail services	30

Respondents who have facsimile equipment use the following services:

Within the same city:	regular mail	31%
	messenger services	27
	facsimile transmission	20
Within the same state:	regular mail	31%
	private express mail services	28
	facsimile transmission	21
Across the country:	private express mail services	36%
	regular mail	24
	facsimile transmission	24
International:	regular mail	23%
	private express mail services	23
	facsimile transmission	22
	telex	20

- Messengers and private express mail services are used to the same extent by respondents who do not have facsimile equipment and those who do.

- The difference lies in the use of regular mail: respondents who do not have facsimile equipment are much more likely to use regular mail than respondents who have facsimile equipment. It appears that regular mail is the competition for facsimile.

- Respondents that have facsimile equipment may be much more sensitive in general to the timing of delivery services -- not only do they use more facsimile transmission and less regular mail, internationally they use more telex and facsimile transmission and less private express mail service.

C. How Likely Is The Target Market To Purchase Facsimile Equipment In The Next Year And How Is The Purchase Decision Made?

- About a quarter of the respondents (26%) believe that their company is very or fairly likely to purchase facsimile equipment in the next 12 months. Companies that already have facsimile equipment are much more likely to purchase new equipment than are companies that do not (31% versus 16% very or fairly likely). Larger companies (with 100 or more employees) are much more likely to purchase new equipment than are smaller companies (33% versus 14% very or fairly likely).

- One hypothesis about why people might hesitate to buy facsimile equipment concerned the perceived speed of growth and evolution in the industry. If the industry was believed to be growing and evolving quickly, it was reasoned, people may want to wait to purchase equipment until the industry and equipment became stable. This hypothesis was not confirmed: respondents who are likely to buy facsimile in the next 12 months are more likely than the total sample to believe the industry is growing (92% versus 81%) and that facsimile technology will evolve very quickly (59% versus 42%).

- The principal reasons given for not having facsimile equipment now and not purchasing it in the next 12 months include:

Do not see the benefit of facsimile in our operations	61%
The equipment would not be used often enough to be cost-effective	52
The people we correspond with do not have facsimile equipment	33

Another major marketing barrier for the industry appears to be demonstrating the need for the equipment in the company's operations. As use of facsimile becomes more widespread, there should be more pressure to get facsimile equipment.

- The majority (58%) of the new fax equipment purchased by companies already having fax equipment will be used to augment rather than replace the existing equipment. Companies that already have facsimile equipment seem to be expanding their use of the technology.

- The purchase cycle for buying facsimile equipment is relatively short, two months or less in the majority (59%) of cases, once the need for the equipment has been determined. As might be expected, the purchase cycle is shorter in smaller companies than in larger companies (73% versus 51% estimate two months or less).

- Among those likely to purchase facsimile equipment in the next 12 months, manufacturers' sales representatives (63%), distributors (50%), and independent dealers (29%) are the sources most likely to be used. As manufacturers continue to decrease their use of sales representatives, distributors and dealers will become even more important.

- The Purchase Decision:

  -- A company's need for facsimile equipment is most often determined by top management (50%) and the administration manager (34%). Top management plays a much more critical role in smaller companies (72%) and is still very important (40%) in larger companies.

  -- Brand selection is most often the responsibility of the administration manager (31%), purchasing manager (28%), and top management (27%). Again, in smaller companies, top management is much more likely to play a critical role (53%). In larger companies, the purchasing manager assumes more responsibility (38%).

  -- Approval for the purchase of facsimile equipment is most often the responsibility of top management (57%), particularly in small companies (79%).

  -- A large majority of the respondents (60%) say that their opinion is very or fairly important in the decision to purchase facsimile equipment. Among respondents who are in top management, the proportion is even higher (78%).

- The most important characteristics of facsimile equipment sought include:

Reliability of the equipment	76%
Reliability of the transmission	75
Quality of reproduction	66
Compatibility with other fax machines	63
Service	57
Ease of operation	52
Speed of transmission	51

  The respondents are clearly indicating that the most important characteristics of the equipment are that it works well and reliably. Unlike most other product categories, the brand name and brand reputation of the equipment ranks very low (#13 out of 18).

- There has not been much brand-name recognition established yet in this industry. The company most recognized as producing facsimile equipment is XEROX, which only scored a 46%.

Companies mentioned by at least 15% of the respondents include:

XEROX	46%
Canon	40
AT&T	36
Exxon (Qwip)	27
Pitney Bowes	27
Panafax	23
Harris/3M	20
Ricoh	19
Omnifax	19
Sharp	17
NEC	16
Bell Telephone companies	16

One of the major challenges for manufacturers in the industry appears to be building brand-name recognition and a reputation for quality and reliability.

- A sizable minority of respondents indicate they would be very interested in facsimile equipment that could interface with computers (38%) and copy onto regular paper (36%), even at additional cost. Other features that draw interest include:

Autodialer for redialing busy numbers	25%
Preprogramming numbers to send to several receivers	25
Ability to send oversized documents	24
Memory	24
Enhanced graphic detail	24

The ability to send and receive color copies (11%) and to easily transport the facsimile machine (10%) are of less interest.

- Respondents tend to get their information about facsimile equipment from the following sources:

Articles in magazines	49%
People who operate the facsimile equipment in the company	46
Business magazines	46
Sales representatives	45
Brochures/mailing pieces	42
Advertisements	39

And rely most heavily on:

People who operate the facsimile equipment in the company	28%
Articles in magazines	25
Sales representatives	24
Business magazines	19

- Although trade journals are not used very heavily by respondents to get information about office equipment, the trade journals used at all tend to be those directed at the end-user:

Modern Office Technology	13%
The Office	8
Telecommunication Products and Technology	7
Communications Week	7
Communications News	6

D. How Widespread Is Facsimile Ownership And How Is The Equipment Used?

- Two thirds of respondents (66%) say their company has facsimile equipment, and larger companies are much more likely to have facsimile equipment than are smaller companies (81% versus 37%). These proportions are probably an over-estimate of the penetration of facsimile equipment because people who are knowledgeable about facsimile equipment are probably much more likely to have facsimile equipment at their company than people who are not. It is not possible, unfortunately, to calculate a more accurate estimate with the data available.

- Among those with facsimile equipment, about a quarter of the companies (27%) have only one facsimile machine, while another quarter (23%) have more than 20. Most of the remaining respondents that know how many machines are at the company say their company has between two and ten machines (28%). Small companies almost always (79%) have only one machine.

- Companies vary widely in how long they have had facsimile equipment: 31% have had facsimile for two years or less, 24% for three to five years, and 28% for six years or more. Smaller companies are much more likely to have started with facsimile only recently -- 55% have had facsimile for only two years or less.

- The facsimile equipment in place now is fairly new -- 45% have been obtained within the past two years. In smaller companies, the equipment is even more likely to be new (65% have been obtained within the past two years), not surprising given their more recent start with facsimile equipment, just noted.

- Most companies (46%) own their existing facsimile equipment rather than lease (10%), and some do a little of both, own and lease (11%). Small companies are much more likely to own the equipment (68%).

- Facsimile equipment tends to be located publicly and in ways it can be shared easily -- centrally (50%) and departmentally (45%). Rarely (7%) is the equipment kept in someone's private office. Companies likely to purchase new equipment in the next 12 months are more likely (62%) to locate equipment departmentally. In other words, companies that recognize the need for departmental equipment see the need for additional equipment. This may indicate another marketing barrier for the industry: demonstrating the need for departmental equipment.

- A substantial majority of respondents (71%) personally make use of the facsimile equipment in their companies, particularly those that are in top management positions (80%) and those in companies that are likely to purchase new equipment in the next 12 months (82%). A majority of those who make use of the equipment (55%) personally put the documents into the facsimile machines, hence the importance of the ease of operation of the machine noted earlier.

- A substantial majority of respondents in companies with facsimile equipment (78%) are also sent facsimiles by other people, particularly respondents who are top managers (87%) and respondents in companies likely to purchase new equipment in the next 12 months (89%).

- The facsimile copy normally takes a long time to be delivered to the recipient, however -- only 28% of respondents say they would get the copy in ten minutes or less. Even among top management, whom one could suppose would be accorded special treatment, only 34% say they would get the copy in ten minutes or less. Overall, 30% claim the copy would take thirty minutes to two hours to be received, and 12% claim the copy would take more than two hours to be received. This delay works to defeat manufacturers' claims for the speed of facsimile and may be part of the resistance

to increased use of facsimile transmission. Flipping the argument, this delay offers strong support to increased use of departmentally- rather than centrally-located facsimile equipment.

- Respondents do not seem to actively encourage people to use facsimile transmission to send documents to them -- only 13% of those whose companies have facsimile equipment have the facsimile telephone number printed on their business card.

- Half (51%) of the respondents in companies with facsimile equipment supervise people who make use of the facsimile equipment, a proportion which increases to 72% among top management, not surprisingly. Almost all of these subordinates (85%) put documents into the facsimile equipment personally.

- Respondents, together with their subordinates, vary widely in the volume of facsimile transmission sent and received each month, among those in companies with facsimile equipment:

Less than 10 pages	32%
11 - 50 pages	22
51 - 200 pages	15
More than 200 pages	7

Surprisingly, volumes are higher for respondents in small companies: 36% of respondents in small companies with facsimile equipment send and receive more than 50 pages each month compared with 22% overall.

- About half the time (52%) documents are being sent via facsimile within the same company and the other half of the time (48%) to another company. Respondents in small companies, of course, are more likely to send documents to another company (69%), while respondents in larger companies are more likely to send documents within the company (58%).

- As was indicated above, portability is not yet a sought-after characteristic of facsimile equipment. Almost none of the respondents (3%) ever bring facsimile equipment home. The home, in general, does not yet seem to be "facsimile territory": only a few respondents (2%) have facsimile equipment permanently located in their home and almost none who do not have it now (2%) foresee permanently locating facsimile equipment in their home in the next 12 months.

E. Demographics

- The size of the companies in which respondents work varies widely:

Less than 100 employees	37%
100 - 999 employees	20
1000 - 9999 employees	18
10,000 or more employees	19

  The subset of respondents selected for further analysis because of their knowledge of facsimile equipment work in companies of equally varied size.

- One third of the respondents work in the industrial sector, while another 58% work in the service sector. The remaining 9% gave an unclassifiable answer.

- Of the total respondents, 41% work in top management jobs and another 29% work in middle management and professional jobs.

TABLES

KNOWLEDGE OF FACSIMILE EQUIPMENT
IN MAILED QUESTIONNAIRE

	Mailed Total (596)
Correctly described	61%
Incorrectly described	18
No idea at all	19
No answer	2

KNOWLEDGE OF FACSIMILE EQUIPMENT
IN TELEPHONE QUESTIONNAIRE

	Telephone Total (100)
Correctly described	32%
Incorrectly described	18
No idea at all	50

ESTIMATE OF KNOWLEDGE OF FACSIMILE EQUIPMENT
AMONG ENTIRE FORTUNE SUBSCRIBER GROUP

RETURNED QUESTIONNAIRE = 30%
61% knew about facsimile equipment

18% of subscriber group

DID NOT RETURN QUESTIONNAIRE = 70%
32% knew about facsimile equipment

22% of subscriber group

TOTAL = 40% of entire FORTUNE subscriber group knowledgeable about facsimile equipment

MISCONCEPTIONS ABOUT FACSIMILE EQUIPMENT

	Those Not Giving Correct Description (103)
Description	
Makes a copy from an original	91%
A brand name of copy equipment	8
A check-signing machine	1
Other Names Used to Refer to Facsimile Equipment	
Copiers	41%
XEROX machines	41
Photocopiers	12
Duplicating machines	6
Mimeograph	4
IBM	4
Savin	1
Other	14
Fax	6
Telecopiers	4
No other names are used	4
No idea at all	10
No answer	1

FAMILIARITY WITH FACSIMILE EQUIPMENT
BEFORE READING DESCRIPTION PROVIDED

Respondents' Description of Facsimile Equipment

	Knowledgeable (362)	Incorrectly Described (103)	No Idea At All (131)
Very familiar	27%	7%	4%
Fairly familiar	29	14	3
Somewhat familiar	38	43	20
Not at all familiar	6	36	73

PERCENTAGE OF TIME WOULD USE VARIOUS SERVICES TO SEND
TEXT OF AN IMPORTANT 6-PAGE DOCUMENT TO VARIOUS PLACES -- Mean Percent
(Among Those Who Do Not Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
		Number Of Employees		
	Total (136)	Under 100 (78)	100 & More* (52)	Top Management (69)
Within the Same City				
Messenger Services	27%	32%	21%	35%
Private Express Mail Services	6	5	9	5
U.S. Postal Service Express Mail	7	11	2	11
Regular Mail	48	42	57	36
Telex	--	--	--	--
Mailgram	--	--	--	--
Other	9	9	9	11
Do not send documents there (%)	16	11	23	9
No answer (%)	14	14	8	15
Within the Same State				
Messenger Services	2	2	3	3
Private Express Mail Services	24	25	23	27
U.S. Postal Service Express Mail	12	18	5	15
Regular Mail	54	47	63	46
Telex	1	1	--	2
Mailgram	--	--	--	--
Other	5	4	3	5
Do not send documents there (%)	13	10	16	7
No answer (%)	15	16	8	15

...continued

*Sample size is very small, interpret cautiously.

PERCENTAGE OF TIME WOULD USE VARIOUS SERVICES TO SEND
TEXT OF AN IMPORTANT 6-PAGE DOCUMENT
TO VARIOUS PLACES -- Mean Percent (Continued)
(Among Those Who Do Not Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
		Number Of Employees		
	Total (136)	Under 100 (78)	100 & More* (52)	Top Management (69)
Across the Country				
Messenger Services	--%	--%	1%	--%
Private Express Mail Services	37	37	37	37
U.S. Postal Service Express Mail	13	16	9	16
Regular Mail	43	42	45	40
Telex	--	--	--	--
Mailgram	1	1	1	1
Other	3	1	3	3
Do not send documents there (%)	11	12	10	9
No answer (%)	13	15	6	14
International				
Messenger Services	--	--	--	--
Private Express Mail Services	30	33	30	31
U.S. Postal Service Express Mail	4	5	3	4
Regular Mail	47	45	50	40
Telex	8	13	2	13
Mailgram	--	--	--	--
Other	3	--	2	6
Do not send documents there (%)	50	48	59	46
No answer (%)	20	24	7	20

*Sample size is very small, interpret cautiously.

PERCENTAGE OF TIME WOULD USE VARIOUS SERVICES TO SEND
TEXT OF AN IMPORTANT 6-PAGE DOCUMENT TO VARIOUS PLACES -- Mean Percent
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)	Top Management (90)
Within the Same City					
Messenger Services	27%	26%	24%	27%	33%
Private Express Mail Services	7	8	5	8	5
U.S. Postal Service Express Mail	3	2	2	3	2
Regular Mail	31	28	42	28	31
Telex	1	2	2	1	2
Facsimile Transmission	20	26	22	20	20
Mailgram	--	--	--	--	--
Other	11	8	3	12	7
Do not send documents there (%)	12	6	16	11	8
No answer (%)	17	15	21	16	18
Within the Same State					
Messenger Services	5	5	4	5	6
Private Express Mail Services	28	28	29	28	29
U.S. Postal Service Express Mail	7	5	4	7	5
Regular Mail	31	26	38	30	31
Telex	3	5	2	3	3
Facsimile Transmission	21	24	24	20	22
Mailgram	--	--	--	--	--
Other	7	7	--	8	4
Do not send documents there (%)	8	8	4	9	2
No answer (%)	18	15	25	17	18

...continued

*Sample size is very small, interpret cautiously.

PERCENTAGE OF TIME WOULD USE VARIOUS SERVICES TO SEND
TEXT OF AN IMPORTANT 6-PAGE DOCUMENT
TO VARIOUS PLACES -- Mean Percent (Continued)
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)	Top Management (90)
Across the Country					
Messenger Services	1%	1%	--%	1%	--%
Private Express Mail Services	36	33	44	35	41
U.S. Postal Service Express Mail	6	4	5	7	6
Regular Mail	24	23	23	24	22
Telex	3	6	2	3	3
Facsimile Transmission	24	28	26	23	24
Mailgram	--	--	--	--	--
Other	6	5	--	7	4
Do not send documents there (%)	8	9	5	8	1
No answer (%)	17	15	23	15	17
International					
Messenger Services	1	1	2	1	1
Private Express Mail Services	23	19	24	23	26
U.S. Postal Service Express Mail	4	3	4	4	2
Regular Mail	23	23	28	22	28
Telex	20	27	15	20	21
Facsimile Transmission	22	19	27	21	18
Mailgram	--	--	--	--	--
Other	7	7	--	8	3
Do not send documents there (%)	29	24	38	27	22
No answer (%)	21	17	27	19	25

*Sample size is very small, interpret cautiously.

LIKELIHOOD OF COMPANY PURCHASING FACSIMILE EQUIPMENT
OVER THE NEXT 12 MONTHS
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
				Number Of Employees	
	Total	Do Not Have Fax	Have Fax	Under 100	100 & More
	(340)	(115)	(225)	(109)	(226)
Very likely	14%	12%	15%	11%	16%
Fairly likely	12	4	16	3	17
Not too likely	29	28	29	32	27
Not at all likely	27	42	20	47	18
No idea at all	12	14	11	3	16
No answer	6	--	8	3	7

PERCEPTION OF GROWTH OF FACSIMILE INDUSTRY
(Among Those At Least Somewhat Familiar with Facsimile Equipment)

	Knowledgeable About Facsimile Equipment					
				Number Of Employees		
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)	Top Management (151)
Growing	81%	84%	92%	80%	81%	82%
Remaining stable	11	11	8	11	11	8
Declining	3	3	--	1	4	4
No idea at all	5	2	--	7	4	4
No answer	1	1	--	2	1	2

HOW RAPIDLY FACSIMILE TECHNOLOGY WILL EVOLVE
(Among Those At Least Somewhat Familiar with Facsimile Equipment)

	Knowledgeable About Facsimile Equipment					
				Number Of Employees		
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)	Top Management (151)
Very quickly	42%	45%	59%	36%	44%	46%
Moderately	44	44	37	48	43	41
Slowly	8	7	3	5	9	4
Very slowly	--	--	--	1	--	1
Will not evolve at all	1	1	--	--	1	1
No idea at all	3	3	1	7	2	4
No answer	2	1	--	4	1	3

REASONS COMPANY DOES NOT HAVE FACSIMILE EQUIPMENT
AND WILL NOT PURCHASE IN THE NEXT TWELVE MONTHS
(Among Those At Least Somewhat Familiar With Facsimile Equipment
Whose Company Does Not Have Facsimile Equipment)

	Knowledgeable* (48)
Do not see the benefit of facsimile in our operations	61%
The equipment would not be used often enough to be cost-effective	52
The people we correspond with do not have facsimile equipment	33
The cost of the equipment	15
Have never really thought about it	4
Facsimile does not provide copies that have a high enough quality	2
Other	2
No answer	3

*Sample size is very small, interpret cautiously.

THE STATUS OF NEW FACSIMILE EQUIPMENT
(Among Those Currently Having Fax and Likely
To Purchase New Equipment in Next 12 Months)

	Knowledgeable About Facsimile Equipment		
		Number Of Employees	
	Total (137)	Under 100* (24)	100 & More (111)
Replace current equipment	30%	42%	28%
In addition to current equipment	58	49	59
No idea at all	7	3	8
No answer	5	6	5

*Sample size is very small, interpret cautiously.

LENGTH OF THE PURCHASE CYCLE ONCE NEED WAS DETERMINED
UNTIL ORDER WAS PLACED
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
				Number Of Employees	
	Total	Have Fax	Likely to Purchase	Under 100	100 & More
	(340)	(225)	(89)	(109)	(226)
Less than 1 month	20%	22%	21%	30%	15%
1 - 2 months	39	38	40	43	36
3 - 4 months	15	16	12	13	17
5 - 6 months	7	8	10	2	9
More than 6 months	4	2	2	--	6
No idea at all	11	10	11	6	12
No answer	5	4	5	6	4

SOURCES MOST LIKELY TO USE TO PURCHASE
FACSIMILE EQUIPMENT
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Manufacturer's sales representative	56%	63%	51%	59%	61%
Distributor	39	50	37	40	41
Independent dealer	27	29	41	23	33
Retail store	7	10	15	4	12
Mail order catalogue	3	4	4	2	4
Buying club/cooperative/ association	3	5	7	1	4
Internally/within company	1	2	--	1	--
Other	1	2	--	1	2
No idea at all	14	12	7	16	9
No answer	9	2	12	8	9

PERSON WHO WOULD PRIMARILY DETERMINE COMPANY'S NEED
FOR FACSIMILE EQUIPMENT
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
				Number Of Employees	
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)
Top management	50%	43%	46%	72%	40%
Administration manager	34	40	26	27	37
Financial manager	7	9	10	3	9
Purchasing manager	4	4	8	1	6
Other manager	18	21	26	4	25
Support staff	12	17	18	9	15
Other	2	2	2	--	2
No idea at all	3	3	1	--	4
No answer	2	2	2	3	2

PERSON WHO WOULD BE PRIMARILY RESPONSIBLE FOR BRAND SELECTION OF FACSIMILE EQUIPMENT
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
				Number Of Employees	
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)
Top management	27%	20%	18%	53%	14%
Administration manager	31	34	21	31	31
Financial manager	8	9	8	5	9
Purchasing manager	28	32	41	10	38
Other manager	12	13	17	5	16
Support staff	19	12	14	5	11
Other	2	3	3	--	3
No idea at all	4	5	3	--	5
No answer	4	3	5	5	4

PERSON WHO WOULD BE PRIMARILY RESPONSIBLE FOR APPROVING THE PURCHASE OF FACSIMILE EQUIPMENT
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
				Number Of Employees	
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)
Top management	57%	50%	51%	79%	47%
Administration manager	18	22	17	11	22
Financial manager	15	18	16	6	19
Purchasing manager	14	18	20	5	19
Other manager	5	6	10	1	7
Support staff	--	--	--	--	--
Other	2	2	3	--	2
No idea at all	3	3	2	--	4
No answer	4	2	3	5	3

IMPORTANCE OF RESPONDENT'S OPINION
IN DECISION TO PURCHASE FACSIMILE EQUIPMENT
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment					
				Number Of Employees		
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)	Top Management (151)
Very important	32%	29%	37%	49%	24%	51%
Fairly important	28	31	39	18	33	27
Not too important	22	23	17	19	23	13
Not at all important	16	16	7	11	19	6
No idea at all	--	1	--	--	1	1
No answer	1	1	--	3	1	2

IMPORTANCE OF FACTORS IN CHOOSING
A FACSIMILE MACHINE -- % VERY IMPORTANT
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Reliability of the equipment	76%	86%	78%	76%	74%
Reliability of the transmission	75	84	71	76	73
Quality of reproduction	66	74	66	66	65
Compatibility with other fax machines	63	68	73	61	64
Service	57	64	56	58	52
Ease of operation	52	56	48	55	46
Speed of transmission	51	58	59	48	49
Warranties	40	43	38	41	32
Cost to operate	36	36	35	36	36
Cost to buy	34	34	45	31	42
Service contracts	27	26	24	28	23
Noise level	20	25	25	19	17
Brand name/reputation	15	21	16	15	12
Staff recommendations	15	14	13	16	17
Size of machine	13	20	20	11	17
Recommendations from business associates or friends	11	14	15	9	13
Sales personnel	9	12	11	9	7
Appearance/styling	3	4	4	2	1

AWARENESS OF FAX MANUFACTURERS AND BRANDS AVAILABLE NOW
(Among Those At Least Somewhat Familiar with Facsimile Equipment)

	Knowledgeable About Facsimile Equipment					
				Number Of Employees		
	Total (340)	Have Fax (225)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)	Top Management (151)
XEROX	46%	47%	58%	48%	45%	49%
Canon	40	42	53	38	40	47
AT&T	36	31	38	36	36	30
Exxon (Qwip)	27	29	30	29	27	29
Pitney Bowes	27	28	37	22	29	22
Panafax	23	29	35	21	25	25
Harris/3M	20	21	22	23	19	19
Ricoh	19	22	24	24	17	20
Omnifax	19	20	32	18	19	18
Sharp	17	17	28	22	14	18
NEC	16	18	21	20	13	17
Bell Telephone companies	16	15	16	13	17	10
Kodak	12	12	12	10	13	8
Savin	10	10	13	7	11	6
Toshiba	10	10	10	14	8	12
Minolta	8	9	17	10	7	9
Fujitsu	6	7	11	7	6	10
Brother	5	5	10	9	3	6
Hitachi	5	4	9	7	4	6
Konica	4	4	6	5	3	3
Sanyo	4	4	10	6	4	4
Telautograph	3	4	9	3	4	3
Adler-Royal	2	3	6	--	3	1
Mitsubishi	2	2	2	4	1	1
Murata	2	3	3	3	2	2
Arden Group	--	--	--	--	--	--
Nitsuko	--	--	--	--	--	--
Others	2	3	2	1	3	2
No idea at all	12	8	6	15	11	13
No answer	2	1	--	6	1	3

INTEREST IN FEATURES AVAILABLE
AT ADDITIONAL COST -- % VERY INTERESTED
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Ability to interface with computers	38%	46%	35%	40%	33%
Ability to copy onto regular paper	36	45	32	38	29
Autodialer for redialing busy numbers	25	35	22	26	24
Preprogramming numbers to send to several receivers	25	36	21	27	21
Ability to send oversized documents	24	36	19	26	21
Memory	24	32	28	23	17
Enhanced graphic detail	24	32	21	24	21
Color copies	11	17	8	13	7
Portability	10	20	7	12	5

SOURCES PERSONALLY USED TO GET INFORMATION ABOUT
FACSIMILE EQUIPMENT
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Articles in magazines	49%	57%	59%	45%	57%
People who operate the facsimile equipment in the company	46	59	38	50	45
Business magazines	46	55	51	44	48
Sales representatives	45	54	52	43	52
Brochures/mailing pieces	42	50	52	38	48
Advertisements	39	43	51	35	44
Business associates	35	40	43	33	40
People who use the copies made by the facsimile equipment in the company	31	34	28	33	33
Trade journals	30	34	34	29	33
Business/trade shows	25	28	34	22	27
Dealer showrooms	21	23	24	20	22
Other	2	--	2	2	2
None of these	11	6	6	13	8
No answer	14	7	17	13	14

SOURCES THAT ARE MOST HELPFUL OR IMPORTANT
IN GETTING INFORMATION ABOUT FACSIMILE EQUIPMENT
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
People who operate the facsimile equipment in the company	28%	36%	19%	30%	25%
Articles in magazines	25	25	30	23	27
Sales representatives	24	29	24	24	27
Business magazines	19	18	22	19	17
People who use the copies made by the facsimile equipment in the company	16	18	13	17	17
Brochures/mailing pieces	15	19	14	15	21
Business associates	15	15	18	14	15
Trade journals	13	17	11	14	13
Business/trade shows	12	14	16	11	14
Advertisements	9	10	14	8	10
Dealer showrooms	9	9	6	10	7
Other	1	--	--	1	1
None of these	5	4	3	5	2
No answer	35	26	38	35	35

TRADE JOURNALS USED TO GET INFORMATION
ABOUT OFFICE EQUIPMENT
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Modern Office Technology	13%	21%	6%	15%	10%
The Office	8	11	7	8	10
Telecommunication Products and Technology	7	7	2	9	5
Communications Week	7	10	2	8	5
Communications News	6	8	1	8	6
Business Electronics Dealer	3	2	1	4	2
Office Products Dealer	3	3	2	3	2
Office System '87	3	2	4	2	2
NOMDA Spokesman	1	2	--	1	--
Geyer's Office Dealer	1	1	--	1	1
American Office Dealer	1	1	1	--	1
Other	3	6	3	3	4
None of these	58	56	56	60	58
No answer	15	8	22	12	15

WHETHER COMPANY CURRENTLY HAS FACSIMILE EQUIPMENT
(Among Those At Least Somewhat Familiar With Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total (340)	Likely to Purchase (89)	Under 100 (109)	100 & More (226)
Yes	66%	79%	37%	81%
No	31	21	63	16
No idea at all	3	--	--	4

NUMBER OF FACSIMILE MACHINES COMPANY HAS
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)
One	27%	13%	79%	16%
2 - 4	16	13	14	16
5 - 10	12	22	4	14
11 - 20	4	9	--	5
More than 20	23	33	--	28
No idea at all	11	8	--	13
No answer	7	1	4	8

*Sample size is very small, interpret cautiously.

LENGTH OF TIME COMPANY HAS HAD FACSIMILE EQUIPMENT
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)
Less than 1 year	7%	6%	16%	6%
1 - 2 years	24	23	39	20
3 - 5 years	24	21	30	23
6 - 10 years	20	27	11	23
More than 10 years	8	9	--	9
No idea at all	9	12	--	11
No answer	8	1	4	9

*Sample size is very small, interpret cautiously.

LENGTH OF TIME COMPANY HAS HAD
FACSIMILE EQUIPMENT IN PLACE NOW
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total	Likely to Purchase	Under 100*	100 & More
	(225)	(71)	(40)	(182)
Less than 1 year	13%	8%	20%	12%
1 - 2 years	32	35	45	29
3 - 5 years	18	24	27	16
6 - 10 years	3	6	5	3
More than 10 years	1	3	--	2
No idea at all	24	23	--	30
No answer	8	--	4	9

*Sample size is very small, interpret cautiously.

OWNERSHIP OF FACSIMILE EQUIPMENT
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)
Equipment Is:				
Owned	46%	42%	68%	40%
Leased	10	11	9	10
Some owned, some leased	11	20	5	13
No idea at all	26	25	14	29
No answer	7	1	4	8

*Sample size is very small, interpret cautiously.

LOCATION OF FACSIMILE EQUIPMENT
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment			
			Number Of Employees	
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)
Centrally located	50%	52%	63%	47%
Departmentally located	45	62	25	50
In someone's private office	7	16	9	7
Other	7	6	5	7
No answer	7	1	5	8

*Sample size is very small, interpret cautiously.

PERSONAL USE OF FACSIMILE EQUIPMENT
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)	Top Management (90)
Yes, personally make use of facsimile equipment	71%	82%	79%	69%	80%
No	22	18	18	23	14
No answer	7	--	4	8	6

*Sample size is very small, interpret cautiously.

PERSONALLY PUT DOCUMENTS INTO FACSIMILE MACHINE
(Among Those Who Personally Make Use of Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase*	Under 100*	100 & More	Top Management
	(160)	(58)	(32)	(127)	(72)
Yes, personally put documents into the facsimile machine	55%	51%	68%	52%	49%
No	43	48	27	46	48
No answer	3	1	5	2	3

*Sample size is very small, interpret cautiously.

WHETHER OR NOT PERSONALLY RECEIVE FACSIMILE DOCUMENTS
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase	Under 100*	100 & More	Top Management
	(225)	(71)	(40)	(182)	(90)
Yes, people send documents to me personally by facsimile	78%	89%	79%	78%	87%
No	15	11	18	15	8
No answer	6	--	4	7	5

*Sample size is very small, interpret cautiously.

LENGTH OF TIME IT TAKES TO RECEIVE THE FAX
(Among Those Who Are Personally Sent Fax Copies)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (177)	Likely to Purchase* (63)	Under 100* (32)	100 & More (142)	Top Management (79)
Under 5 minutes	6%	5%	18%	3%	8%
5 - 10 minutes	22	15	27	22	26
11 - 15 minutes	9	10	11	8	7
16 - 30 minutes	13	14	14	13	16
31 - 60 minutes	20	17	14	21	16
90 minutes	3	6	2	4	4
2 hours	7	10	--	9	7
Over 2 hours	12	13	9	12	6
No idea at all	5	7	5	5	5
No answer	4	5	--	5	5

*Sample size is very small, interpret cautiously.

FACSIMILE TELEPHONE NUMBER ON BUSINESS CARD
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase	Under 100*	100 & More	Top Management
	(225)	(71)	(40)	(182)	(90)
Yes	13%	16%	14%	13%	15%
No	72	78	72	72	77
Do not have a business card	5	6	7	5	--
No answer	9	--	7	10	8

*Sample size is very small, interpret cautiously.

USE OF FACSIMILE EQUIPMENT BY SUBORDINATES
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)	Top Management (90)
Yes, supervise people who make use of facsimile equipment	51%	62%	66%	47%	72%
No	43	39	30	46	23
No answer	6	--	4	7	5

*Sample size is very small, interpret cautiously.

WHETHER SUBORDINATES PERSONALLY PUT DOCUMENTS INTO FACSIMILE EQUIPMENT
(Among Those Whose Subordinates Use Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase*	Under 100*	100 & More	Top Management*
	(114)	(44)	(27)	(86)	(65)
Yes, subordinates put documents into facsimile equipment themselves	85%	84%	100%	82%	87%
No	12	11	--	15	10
No answer	3	5	--	3	3

*Sample size is very small, interpret cautiously.

NUMBER OF PAGES SEND/RECEIVE VIA FACSIMILE EQUIPMENT
IN AVERAGE MONTH
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (225)	Likely to Purchase (71)	Under 100* (40)	100 & More (182)	Top Management (90)
None	5%	6%	2%	6%	2%
1 - 5 pages	14	11	2	17	14
6 - 10 pages	13	13	18	12	15
11 - 20 pages	8	10	5	9	6
21 - 25 pages	4	4	2	4	5
26 - 50 pages	10	12	16	9	9
51 - 100 pages	10	14	14	9	13
101 - 200 pages	5	7	13	4	9
More than 200 pages	7	12	9	7	6
No idea at all	15	9	14	14	12
No answer	9	1	5	10	10

*Sample size is very small, interpret cautiously.

PERCENTAGE OF TIME DOCUMENTS ARE SENT TO/RECEIVED FROM
WITHIN THE COMPANY OR FROM ANOTHER COMPANY
BY RESPONDENT/SUBORDINATES -- Mean Percent
(Among Those Who Currently Have Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase	Under 100*	100 & More	Top Management
	(225)	(71)	(40)	(182)	(90)
Within the company	52%	55%	31%	58%	47%
Another company	48	45	69	42	53
Company does not have branch offices (%)	8	--	36	2	10
Do not send/receive documents (%)	5	5	--	6	2
No answer	15	10	5	17	16

*Sample size is very small, interpret cautiously.

WHETHER BRING FACSIMILE EQUIPMENT HOME TO USE
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (292)	Likely to Purchase (89)	Under 100 (70)	100 & More (217)	Top Management (120)
Often	1%	1%	1%	--%	1%
Sometimes	--	--	--	--	--
Seldom	2	2	3	1	4
Never	90	93	84	92	87
No answer	8	5	12	7	8

WHETHER HAVE FACSIMILE EQUIPMENT PERMANENTLY LOCATED IN HOME
(Among Those Who Might Be or Have Been in the Market
For Facsimile Equipment)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total	Likely to Purchase	Under 100	100 & More	Top Management
	(292)	(89)	(70)	(217)	(120)
Yes, have facsimile equipment permanently located in home	2%	2%	4%	1%	2%
No	91	97	87	93	92
No answer	7	2	9	6	6

LIKELIHOOD OF HAVING FACSIMILE EQUIPMENT PERMANENTLY LOCATED IN HOME IN THE NEXT 12 MONTHS

(Among Those Who Might Be or Have Been in the Market For Facsimile Equipment and Who Do Not Currently Have Facsimile Equipment At Home)

	Knowledgeable About Facsimile Equipment				
			Number Of Employees		
	Total (266)	Likely to Purchase (87)	Under 100* (61)	100 & More (201)	Top Management (110)
Very likely	--%	1%	1%	--%	1%
Fairly likely	2	4	6	1	4
Not too likely	11	19	14	9	14
Not at all likely	78	65	71	81	71
No idea at all	6	5	7	5	5
No answer	3	6	1	4	5

*Sample size is very small, interpret cautiously.

NUMBER OF EMPLOYEES IN ENTIRE CORPORATION OR FIRM

	Mailed Total (596)	Knowledgeable About Facsimile Equipment	
		Total (362)	Likely to Purchase (89)
Fewer than 10	17%	14%	8%
10 - 24	9	7	2
25 - 49	5	6	2
50 - 99	6	7	4
100 - 249	8	8	10
250 - 499	7	8	10
500 - 999	5	6	6
1000 - 4999	12	14	16
5000 - 9999	6	6	13
10,000 or more	19	22	28
No answer	8	2	1

PRINCIPAL ACTIVITY OF COMPANY

	Mailed Total (596)	Knowledgeable About Facsimile Equipment				
		Total (362)	Have Fax (225)	Likely to Purchase (89)	Number Of Employees: Under 100 (118)	Number Of Employees: 100 & More (235)
Industrial						
Manufacturing, processing, publishing	21%	26%	32%	26%	15%	32%
Transportation, communications, utilities	6	7	10	10	4	9
Mining, oil or gas extraction	3	3	4	2	2	4
Construction	3	2	2	2	5	1
Service						
Banking, finance, insurance, real estate	17	21	20	23	20	22
Wholesale or retail trade	16	13	11	15	16	11
Education	4	3	1	1	--	4
Professional or business services	19	20	15	16	36	12
Government	2	2	2	4	--	2
Other	1	1	2	--	1	1
No answer	8	3	2	--	1	1

JOB TITLE OR POSITION

	Mailed Total (596)	Knowledgeable About Facsimile Equipment: Total (362)	Likely to Purchase (89)	Number Of Employees: Under 100 (118)	Number Of Employees: 100 & More (235)
Top Management					
Chairman of the Board, President, CEO	12%	14%	16%	31%	5%
Vice President	10	13	13	14	13
Other Company Officer or General Manager	9	11	17	6	13
Owner, Partner	10	7	2	17	2
Other Management	18	22	22	7	30
Professional	11	12	9	7	14
Salesperson, Broker, Agent, Representative	10	11	14	12	11
Trainee, Office Worker, Production Worker	6	5	3	5	6
Skilled Craftsman, Laborer	3	1	2	1	1
Student	2	1	2	--	2
Retired	7	3	1	1	3
Housewife	1	--	--	--	--
No answer	2	1	--	--	--

APPENDIX

FORTUNE

James B. Hayes
Publisher

May, 1987

Dear Subscriber:

WOULD YOU DO US A FAVOR?

We are conducting a nationwide survey about people's knowledge and use of facsimile equipment. We are turning to you for help so that we can understand and serve **your** needs better.

We would deeply appreciate your cooperation **regardless** of how familiar you may be with facsimile equipment. One of the things we need to find out is how familiar people are with the equipment and therefore hearing from people who are not familiar is just as important to us as hearing from people who are. Because we are sending this survey only to a scientifically selected sample, **your** answers are essential to the accuracy of this study.

The survey should take only a few minutes to fill out. There are no right or wrong answers, we are just interested in your honest and thoughtful replies. Once you have finished, simply return the survey to us in the stamped envelope provided. All of your answers will, of course, be kept confidential.

Thank you for your help with this important project.

Sincerely,

James B. Hayes
Publisher

P.S. The enclosed dollar bill is meant only as a token of appreciation. It may brighten the day of a youngster you know.

*Please answer the two questions below **before** opening the booklet and continuing with the rest of the survey.*

1 Please describe as best you can what facsimile equipment does, that is, the principal use of facsimile equipment.

_____ 6

_____ 7

_____ 8

9 ☐ No idea at all

2 As far as you know, are there any other names used to refer to facsimile equipment?

10 ☐ No
2 ☐ Yes
3 ☐ No idea at all

IF YES What are these names?

_____ 11

_____ 12

[13-18]

Please break the seal at the right and continue with the questions inside. Please do not return to either of these questions once you have started the questions inside.

Thank you.

Please read the following description of ***facsimile equipment*** *carefully.*

Facsimile equipment is **not** designed to be standard photocopying equipment. Instead, facsimile equipment transmits a copy of a document from one location to another over standard telephone lines. The document being sent could be anything that could be copied on a photocopier, like a letter, report, bulletin, newspaper article, chart, graph, graphics, black & white photograph, etc.

The document is handled in its original form without requiring any additional typing or reformatting. The original document is fed into the facsimile equipment where it is scanned and "digitized" by the unit's microprocessor. This data is transmitted through the telephone lines to a facsimile machine at the receiving end, where it is converted back into an actual copy. In other words, a person at one end feeds the original document into the facsimile machine at that end and in a few seconds another person gets a copy of the document out of the facsimile machine at the receiving end.

The sending and receiving locations can be close together or far apart, even international, wherever there are telephone lines. No special telephone lines are required, just the regular, voice-grade communications telephone lines that come with regular telephone service.

Facsimile machines are also referred to as "fax" machines or "telecopiers".

FACSIMILE INDUSTRY STUDY

1. How familiar would you say you were with facsimile machines before you read the description provided?

   19-1 ☐ Very familiar
   2 ☐ Fairly familiar
   3 ☐ Somewhat familiar
   4 ☐ Not at all familiar → SKIP TO Q.#36

2. Based on whatever impressions you may have, do you think the facsimile industry as a whole is **growing**, remaining **stable** or **declining**?

   20-1 ☐ Growing 2 ☐ Remaining stable 3 ☐ Declining 4 ☐ No idea at all

3. How rapidly do you think facsimile technology will evolve?

   21-1 ☐ Very quickly 3 ☐ Slowly 5 ☐ Will not evolve at all
   2 ☐ Moderately 4 ☐ Very slowly 6 ☐ No idea at all

4. Below is a list of some of the manufacturers and brand names of facsimile machines. In some cases, the manufacturer makes other products besides facsimile equipment. Please "X" all of the manufacturers you have heard of as **currently** producing **facsimile machines** and the brand names of fax machines you have heard of as **available now.** (PLEASE "X" ALL THAT APPLY.)

   22-1 ☐ Adler-Royal
   2 ☐ Arden Group
   3 ☐ AT&T
   4 ☐ Brother
   5 ☐ Bell Telephone companies
   6 ☐ Canon
   7 ☐ Exxon (Qwip)
   8 ☐ Fujitsu
   9 ☐ Harris/3M

   23-1 ☐ Hitachi
   2 ☐ Kodak
   3 ☐ Konica
   4 ☐ Minolta
   5 ☐ Mitsubishi
   6 ☐ Murata
   7 ☐ NEC
   8 ☐ Nitsuko
   9 ☐ Omnifax

   24-1 ☐ Panafax
   2 ☐ Pitney Bowes
   3 ☐ Ricoh
   4 ☐ Sanyo
   5 ☐ Savin
   6 ☐ Sharp
   7 ☐ Telautograph
   8 ☐ Toshiba
   9 ☐ Xerox

   0 ☐ Others (Please specify): _____ 25 _____ 26
   X ☐ No idea at all

5. How **important** would you say **your opinion** is if your company/division/department were to make a decision to purchase facsimile equipment?

   27-1 ☐ Very important
   2 ☐ Fairly important
   3 ☐ Not too important
   4 ☐ Not at all important
   5 ☐ No idea at all

6. If your company were to purchase new facsimile equipment, who would primarily **determine** your company's **need** for a facsimile machine? (PLEASE "X" THE APPROPRIATE BOXES IN THE **FIRST** COLUMN.)

   Who would primarily be responsible for **brand selection** once the need was determined? (PLEASE "X" THE APPROPRIATE BOXES IN THE **SECOND** COLUMN.)

   Who would primarily be responsible for **approving** the **purchase** once the brand was selected? (PLEASE "X" THE APPROPRIATE BOXES IN THE **THIRD** COLUMN.)

	DETERMINES NEED	BRAND SELECTION	APPROVES PURCHASE
Top management	28-1 ☐	29-1 ☐	30-1 ☐
Administration manager	2 ☐	2 ☐	2 ☐
Financial manager	3 ☐	3 ☐	3 ☐
Purchasing manager	4 ☐	4 ☐	4 ☐
Other manager	5 ☐	5 ☐	5 ☐
Support staff (secretaries, office workers, etc.)	6 ☐	6 ☐	6 ☐
Other (Please specify):			
_____ 31	7 ☐	7 ☐	7 ☐
_____ 32	8 ☐	8 ☐	8 ☐
_____ 33	9 ☐	9 ☐	9 ☐
No idea at all	0 ☐	0 ☐	0 ☐

7. If your company were to realize today that new facsimile equipment was needed, how long do you expect it would take altogether for your company to decide which equipment to purchase and place the order? Write your answer on the lines below. If you do not know, please write in your best guess.

Number of months _____ Number of weeks _____ Number of days _____

☐ No idea at all

8. To the best of your knowledge, does your company/division/department currently have facsimile equipment?

☐ Yes → SKIP TO Q #11 ☐ No ☐ No idea at all

9. How likely do you think your company/division/department will be to purchase facsimile equipment over the next 12 months?

☐ Very likely
☐ Fairly likely → SKIP TO Q #28
☐ Not too likely
☐ Not at all likely → GO TO Q 10
☐ No idea at all → SKIP TO Q #28

10. Listed below are some reasons people have given for not making use of facsimile equipment. Please "X" all of the reasons why your company does not make use of facsimile. (PLEASE "X" ALL THAT APPLY. **WHEN YOU HAVE FINISHED THIS QUESTION, PLEASE SKIP TO QUESTION #36)**

☐ The cost of the equipment
☐ Do not see the benefit of facsimile in our operations
☐ The people we correspond with do not have facsimile equipment
☐ Have never really thought about it
☐ Facsimile does not provide copies that have a high enough quality
☐ The equipment would not be used often enough to be cost-effective
☐ Other (Please specify) _____

11. How likely do you think your company/division/department will be to purchase facsimile equipment over the next 12 months?

☐ Very likely
☐ Fairly likely
☐ Not too likely
☐ Not at all likely
☐ No idea at all

→ SKIP TO Q #13

12. If your company/division/department were to purchase new fax machines, would this new equipment **replace** facsimile equipment you currently have or would it be **in addition** to facsimile equipment you currently have?

☐ Replace current equipment ☐ In addition to current equipment ☐ No idea at all

13. As far as you know, how long has your company had facsimile equipment? If you do not know, please write in your best guess.

Number of years _____ Number of months _____

☐ No idea at all

14. Approximately how many facsimile machines does your company have currently?

☐ One ☐ 2-4 ☐ 5-10 ☐ 11-20 ☐ More than 20 ☐ No idea at all

15. On average, how long has your company had the particular machines that are in place now?

Number of years _____ Number of months _____

☐ No idea at all

16. Is the fax equipment owned or leased?

☐ Owned ☐ Leased ☐ Some owned, some leased ☐ No idea at all

17. Where are the fax machines located? (PLEASE "X" ALL THAT APPLY.)

☐ Centrally located
☐ Departmentally located
☐ In someone's private office
☐ Other (Please specify): _____
☐ No idea at all

18. Do you personally now make use of facsimile equipment to send documents to someone else?

☐ Yes ☐ No → SKIP TO Q.#20

19. Do you personally put documents into the fax machine?

☐ Yes ☐ No

20 As best you can remember, how long have you personally made use of facsimile equipment? If you personally have never made use of fax machines, write in "0". If you do not remember, please write in your best guess.

Number of years _____ Number of months _____ (56-57)

☐ No idea at all

21 Do you supervise people who make use of facsimile equipment to send documents to someone else?

☐ Yes ☐ No → SKIP TO Q.#23

22 Do these people themselves put documents into the fax machine?

☐ Yes ☐ No

23 Do people ever send documents to you personally by facsimile?

☐ Yes ☐ No → SKIP TO Q.#25

24 How long does it take, on average, for you to receive the fax? Please assume that the fax copy is delivered to your office through your company's normal distribution process.

Number of days Number of hours _____ Number of minutes _____ (62-65)

☐ No idea at all

25 What percentage of the time do you and, if applicable, the people who work for you, use facsimile equipment to send documents to or receive documents from other parts of **your** company and what percentage of the time to send documents to or receive documents from **other** companies not your own? PLEASE BE SURE YOUR NUMBERS TOTAL TO 100.

	PERCENTAGE OF TIME
Documents sent to/received from within my company	_____%
Documents sent to/received from another company	_____%
	TOTAL = 100%

☐ Company does not have any branch offices
☐ Do not send or receive documents

26 Overall, how many pages do you send and receive via facsimile machine in the course of an average month. If you do not know, please write in your best guess. If none, please write in "0".

Number of pages per month _____

☐ No idea at all

27 Do you have your company's facsimile telephone number on your business card?

☐ Yes ☐ No ☐ Do not have a business card

28 Listed below are factors that could be important in selecting facsimile equipment. For each factor, please "X" how important that factor would be to you in choosing a fax machine.

	VERY IMPORTANT	FAIRLY IMPORTANT	NOT TOO IMPORTANT	NOT AT ALL IMPORTANT	
Cost to buy	☐	☐	☐	☐	(77)
Cost to operate	☐	☐	☐	☐	(78)
Sales personnel	☐	☐	☐	☐	(80-1)
Ease of operation	☐	☐	☐	☐	(6)
Speed of transmission	☐	☐	☐	☐	(7)
Quality of reproduction	☐	☐	☐	☐	(8)
Size of the machine	☐	☐	☐	☐	(9)
Service	☐	☐	☐	☐	(10)
Appearance/styling	☐	☐	☐	☐	(11)
Brand name/reputation	☐	☐	☐	☐	(12)
Noise level	☐	☐	☐	☐	(13)
Reliability of the equipment	☐	☐	☐	☐	(14)
Reliability of the transmission	☐	☐	☐	☐	(15)
Service contracts	☐	☐	☐	☐	(16)
Warranties	☐	☐	☐	☐	(17)
Compatibility with other fax machines	☐	☐	☐	☐	(18)
Staff recommendations	☐	☐	☐	☐	(19)
Recommendations from business associates or friends	☐	☐	☐	☐	(20)
Other (Please specify)					
_____ 25	☐	☐	☐	☐	(22)
_____ 26	☐	☐	☐	☐	(23)
_____ 27	☐	☐	☐	☐	(24)

29. Listed below are several features of fax machines that would be available at additional cost. For each feature, please "X" how interested you would be in getting that feature on your next fax machine.

	VERY INTERESTED	FAIRLY INTERESTED	NOT TOO INTERESTED	NOT AT ALL INTERESTED	
Autodialer for redialing busy numbers	1 ☐	2 ☐	3 ☐	4 ☐	(28)
Ability to interface with computers	1 ☐	2 ☐	3 ☐	4 ☐	(29)
Portability	1 ☐	2 ☐	3 ☐	4 ☐	(30)
Color copies	1 ☐	2 ☐	3 ☐	4 ☐	(31)
Ability to send oversized documents	1 ☐	2 ☐	3 ☐	4 ☐	(32)
Ability to copy onto regular paper	1 ☐	2 ☐	3 ☐	4 ☐	(33)
Preprogramming numbers to send to several receivers	1 ☐	2 ☐	3 ☐	4 ☐	(34)
Memory	1 ☐	2 ☐	3 ☐	4 ☐	(35)
Enhanced graphic detail	1 ☐	2 ☐	3 ☐	4 ☐	(36)

30. Listed below are some sources of information about facsimile equipment. Please "X" in the first column **all** of the sources you personally use to get information about facsimile equipment and "X" in the second column those sources that are the **most** helpful or important to you. (PLEASE "X" ALL THAT APPLY.)

	USE SOURCE	MOST HELPFUL/ IMPORTANT SOURCES
Sales representatives	37 ☐	38 ☐
Articles in magazines	☐	☐
Brochures/mailing pieces	☐	☐
Advertisements	☐	☐
Business/trade shows	☐	☐
Dealer showrooms	☐	☐
Business magazines	☐	☐
Trade journals	☐	☐
People who operate facsimile equipment in your company	☐	☐
People who use the copies made by the facsimile equipment in your company	☐	☐
Business associates	☐	☐
Other (Please specify)		
_____	☐	☐
_____	☐	☐
None of these	☐	☐

31. From which sources would your company/division/department be likely to purchase facsimile equipment? (PLEASE "X" ALL THAT APPLY.)

- 43 ☐ Manufacturer's sales representative
- ☐ Distributor
- ☐ Independent dealer
- ☐ Retail store
- ☐ Mail-order catalogue
- ☐ Buying club/cooperative/association
- ☐ Other (Please specify) _____ 44
- ☐ No idea at all

32. How often, if ever, do you bring portable facsimile equipment home to use there?

45 ☐ Often ☐ Sometimes ☐ Seldom ☐ Never

33. Do you have facsimile equipment permanently located in your home?

46 ☐ Yes → SKIP TO Q.#35 ☐ No

34 How likely do you think you will be to have facsimile equipment permanently located in your home within the next 12 months?

- [ ] Very likely
- [ ] Fairly likely
- [ ] Not too likely
- [ ] Not at all likely
- [ ] No idea at all

35 Which, if any, of the following trade journals do you use to get information about office equipment? (PLEASE "X" ALL THAT APPLY.)

- [ ] The Office
- [ ] Modern Office Technology
- [ ] Office System '87
- [ ] Communications News
- [ ] Business Electronics Dealer
- [ ] Office Products Dealer
- [ ] Geyer's Office Dealer
- [ ] American Office Dealer
- [ ] NOMDA Spokesman
- [ ] Telecommunication Products and Technology
- [ ] Communications Week
- [ ] Other (Please specify)
- [ ] None of these

36 Listed below are various services that get documents from one place to another. Imagine that you needed to get the **text** of **an important 6-page document** to another location. Thinking about the ways you **currently** get copies from one place to another, please indicate what percentage of the time you would send the text of an important 6-page document with each service. Record percentages in the first column for getting the document to somewhere in the **same city**, the second column for somewhere in the **same state**, the third column for somewhere **across the country**, and the fourth column for somewhere **international** (not including Canada and Mexico). PLEASE BE SURE YOUR NUMBERS TOTAL 100 IN EACH COLUMN. If you do not ever send documents to one of these places, check the box at the top of the column and move on to the next.

	SAME CITY	SAME STATE	ACROSS COUNTRY	INTER-NATIONAL
DO NOT EVER SEND DOCUMENTS THERE	[ ]	[ ]	[ ]	[ ]
Messenger services	%	%	%	%
Private express mail services (e.g., Federal Express, Purolator)	%	%	%	%
U.S. Postal Service's Express Mail	%	%	%	%
Regular mail	%	%	%	%
Telex	%	%	%	%
Facsimile transmission	%	%	%	%
Mailgram	%	%	%	%
Other (Please specify)				
	%	%	%	%
	%	%	%	%
TOTAL	100%	100%	100%	100%

(OVER PLEASE)

37. **Last, for classification purposes:**

a. Approximately how many employees are there in your entire corporation or firm — that is, the total number of employees including all plants, divisions, branches and subsidiaries?

- ☐ Fewer than 10
- ☐ 10 - 24
- ☐ 25 - 49
- ☐ 50 - 99
- ☐ 100 - 249
- ☐ 250 - 499
- ☐ 500 - 999
- ☐ 1,000 - 4,999
- ☐ 5,000 - 9,999
- ☐ 10,000 or more

b. What is the principal activity of the company (or division, if applicable) for which you work?

- ☐ Manufacturing, processing, publishing
- ☐ Transportation, communications, utilities
- ☐ Mining, oil or gas extraction
- ☐ Construction
- ☐ Banking, finance, insurance, real estate
- ☐ Wholesale or retail trade
- ☐ Education
- ☐ Professional or business services (medical, accounting, data processing, consulting, etc.)
- ☐ Other _____

(Please specify)

c. What is your job title or position?

- ☐ Chairman of the Board, President, CEO
- ☐ Vice President
- ☐ Other company officer or general manager
- ☐ Other management
- ☐ Owner, partner
- ☐ Professional (doctor, lawyer, etc.)
- ☐ Salesperson, broker, agent, representative
- ☐ Trainee, office worker, production worker
- ☐ Skilled craftsman, laborer
- ☐ Student
- ☐ Retired
- ☐ Housewife
- ☐ Other _____

(Please specify)

d. In which state do you reside? _____

THANK YOU VERY MUCH!

(80-3)

FO1013

Beta Research Corp.
Syosset, N.Y. 11791

F01024
June, 1987

FACSIMILE INDUSTRY TELEPHONE FOLLOW-UP STUDY

Hello, my name is _____ from Beta Research Corp. We have been asked by Fortune magazine to contact you regarding an eight-page survey about your knowledge and use of facsimile (FAX SI MA LEE) equipment that was mailed to you a few weeks ago.

1. Did you receive this survey?

( ) Yes ( ) No --- SKIP TO A.

2. Did you fill it out and return it to us?

( ) Yes --- THANK AND TERMINATE
( ) No

A. May I have a few minutes of your time to ask you a couple of brief questions. Please remember that there are no right or wrong answers. We only want your honest and thoughtful replies.

1. Please describe as best you can what facsimile equipment does, that is, the principal use of facsimile equipment.

_____

_____

_____

( ) No idea at all --- (DO NOT READ)

2. As far as you know, are there any other names used to refer to facsimile equipment?

( ) No
( ) Yes
( ) No idea at all

IF YES: What are these names?

_____

_____

I'd like to read you a description and then ask you four brief questions.

Facsimile equipment is not designed to be standard photocopying equipment. Instead, facsimile equipment transmits a copy of a document from one location to another over standard telephone lines. The document being sent could be anything that could be copied on a photocopier, like a letter, report, bulletin, newspaper article, chart, graph, graphics, black and white photograph, etc.

The document is handled in its original form without requiring any additional typing or reformatting. The original document is fed into the facsimile equipment where it is scanned and "digitized" by the unit's microprocessor. This data is transmitted through the telephone lines to a facsimile machine at the receiving end, where it is converted back into an actual copy. In other words, a person at one end feeds the original document into the facsimile machine at that end and in a few seconds another person gets a copy of the document out of the facsimile machine at the receiving end.

The sending and receiving locations can be close together or far apart, even international, wherever there are telephone lines. No special telephone lines are required, just the regular, voice-grade communications telephone lines that come with regular telephone service.

Facsimile machines are also referred to as "fax" machines or "telecopiers".

(OVER)

3. How familiar would you say you were with facsimile machines before I read you the description?

( ) Very familiar
( ) Fairly familiar
( ) Somewhat familiar
( ) Not at all familiar

4a. Approximately how many employees are there in your entire corporation or firm - that is, the total number of employees including all plants, divisions, branches and subsidiaries?

( ) Fewer than 10	( ) 250 - 499
( ) 10 - 24	( ) 500 - 999
( ) 25 - 49	( ) 1,000 - 4,999
( ) 50 - 99	( ) 5,000 - 9,999
( ) 100 - 249	( ) 10,000 or more

4b. What is the principal activity of the company (or division, if applicable) for which you work?

READ:
( ) Manufacturing, processing, publishing
( ) Transportation, communications, utilities
( ) Mining, oil or gas extraction
( ) Construction
( ) Banking, finance, insurance, real estate
( ) Wholesale or retail trade
( ) Education
( ) Professional or business services (medical, accounting, data processing, consulting, etc.)
( ) Other: _____
(please specify)

4c. What is your job title or position?

READ:
( ) Chairman of the Board, President, CEO
( ) Vice President
( ) Other company officer or general manager
( ) Other management
( ) Owner, partner
( ) Professional (doctor, lawyer, etc.)
( ) Salesperson, broker, agent, representative
( ) Trainee, officer worker, production worker
( ) Skilled craftsman, laborer
( ) Student
( ) Retired
( ) Housewife
( ) Other _____
(please specify)

THANK YOU VERY MUCH!

( ) LIST A (RENEW)

( ) LIST B (NEW)

RESPONDENT: _____ INTERVIEWER: _____

ADDRESS: _____ VERIFIED BY: _____

_____ PHONE # (___) _____

DAY OF INTERVIEW:

( ) Sun ( ) Mon ( ) Tues ( ) Weds ( ) Thurs ( ) Fri ( ) Sat

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